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Similarities and differences in views of ageing and learning in Hong Kong and Australia

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Abstract

This paper is an overview and summary of the findings from a General Research Fund project funded (2012 – 2014) by the Research Grants Council of the University Grants Committee of Hong Kong to investigate cross cultural understanding of ageing and learning by seniors in Hong Kong and Australia. Results have been published separately in Boulton-Lewis, & Buys (2015), Boulton-Lewis, Aird, & Buys (2016), Boulton-Lewis, Tam, Buys, & Chui (2016), Tam (2016), Tam & Chui (2016) and Tam, Aird, Boulton-Lewis & Buys (2016). These papers have dealt separately and variously with either a qualitative or quantitative analysis of learning choices in Australia, structural barriers to learning in Australia, a comparison of views of and ageing and learning in both cultures, Chinese views of later life learning, the meaning of ageing and learning to Chinese elders and an analysis and comparison of results in both places.

The focus of this paper is a summative discussion based mainly on the quantitative and qualitative analyses of the main themes of ageing and learning. It intends to provide an overview of the findings in some of the publications above. Other details can be found in the publications listed.

BACKGROUND

Research has shown that learning is essential to healthy and active ageing and effects the enjoyment of life, confidence, self-concept, self-satisfaction, health and the ability to cope (Boulton-Lewis, 2010). The World Health Organization (WHO, 2015) stated recently that abilities to learn, grow and make decisions are important in healthy ageing.

The abilities to learn, grow and make decisions include efforts to continue to learn and apply knowledge, engage in problem solving, continue personal development, and be

able to make choices. Continuing to learn enables older people to have the knowledge and skills to manage their health, to keep abreast of developments in information and technology, to participate (for example, by working or volunteering), to adjust to ageing (for example, to retirement, widowhood or becoming a caregiver), to maintain their identity and to keep interested in life. Continued personal growth – mental, physical, social and emotional – is important for enabling older people to do what they value, and the ability to make decisions is key to older people’s sense of control (WHO, 2015: 174).

There has been limited research on the effects of cultural influence on learning by older adults and very little concerned with learning by the elderly from their perspective. The two locations were chosen because the Hong Kong and Australian researchers had previously worked collaboratively and because Hong Kong is a Chinese-oriented society and Australia is predominantly a Western culture. This made it possible to undertake an East-West comparison with regard to elder learning in the two cultures.

A broad view of culture as opposed to an overly simplistic East-West comparison underlines the approach of this research for investigating both the differences and similarities across cultures, as well as capturing the nuances and intricacies that exist in each individual’s understanding and conceptualization of cultural constructs such as ageing and lifelong learning.

The aim of this research was to make a significant contribution to knowledge, and give insight into perspectives on ageing. It examines the similarities and differences in reasons, choices, processes and barriers for elders in different cultural contexts as they conceptualize, experience and negotiate ongoing learning. More specifically the objectives were to

- describe and conceptualize the meaning of ageing and learning as experienced by elders from two different cultures – Hong Kong and Australia,
- investigate how and why elders in Hong Kong and Australia engaged or did not engage in learning, by examining their reasons for continued learning and barriers to participation,
- identify important learning issues for older learners in the two cultures, including their interests and choices, and finally
- investigate the relationship between learning and ageing, and between learning and the overall well-being and satisfaction of elders in Hong Kong and Australia.

LITERATURE REVIEW

Meaning of ageing

What does it mean by ageing or ageing well? Although the answer may vary from individual to individual, there has been extant literature on how it should be defined and measured since the first conceptual definition of ‘successful ageing’ by Havighurst (1961) as a condition of elders living a satisfying life instead of being a costly burden to society. In the literature, theories that conceive success in ageing can be summarized from four perspectives (Tam & Chui, 2016). First is the biomedical view of freedom from illnesses and absence of age-related decrements – physical, mental and psychological, represented by Rowe & Kahn (1987; 1998). Second is the perspective of Baltes and Baltes’ (1990) ‘selective optimization with compensation’ where elders can cope well with ageing through engaging in activities and behaviours that can compensate for age-related limitations. The third perspective is Atchley’s (1989) continuity theory of successful ageing, a continuation of the same activities, behaviours, personalities, and relationships into older age. Fourth is the multidimensional view offered by the World Health Organization (WHO) where successful ageing is defined as the “process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age” (WHO, 2002: 12). Successful ageing is a complex, subjective concept where opportunities should be provided for elders to explain what they mean by successful ageing and the underlying factors that they regard as important. Such an imperative underpins the current research reported in this paper, where one of the aims is to examine and elucidate the meanings of ageing as conceived by elders in two cultures: Hong Kong and Australia.

Meaning of learning

Learning in older age is synonymous with elder learning or later life learning which refers to the process of engaging, individually or collaboratively, in purposeful reflections to result in transformation, validation, and ascribing personal meaning to previous knowledge (Mercken, 2010: 9). Elder learning is therefore not about mastery or competence as for youngsters. Rather, through learning, elders are encouraged to engage in reflective thinking with the aim of contemplating the meaning of life and their past, and seeking self-fulfillment and spiritual advancement in the later years of their life (Findsen & Formosa, 2011). In the literature, some

research studies have focused on two distinct meanings of elder learning: expressive versus instrumental (O'Connor, 1987; Silverstein, Choi & Bulot, 2001). Expressive learning is about personal development and social relations, whilst instrumental learning refers to work-related purposes including learning for skills and career needs. Also in two broad categories, Hodkinson et al (2008) view learning in later life as being composed of two main kinds: acquisition versus becoming. Learning is acquisition when the main purpose is to acquire knowledge and skills as commodities. Learning is becoming when the elder learner undergoes a process of construction and reconstruction to result in new self-identities and understandings. Such a view is resonant with the socio-cultural perspective which conceives learning in later life as constructivist (Tusting & Barton, 2006), looking for meaning that elder learners give to their tasks or activities, and how learning is connected to their lives and related to their self-understanding, experiences, social and cultural contexts. In this light, learning is seen to be inherently social in nature and is shaped by the cultural context in which learners find themselves (Lave, 1996; Taylor et al, 2006). Of particular relevance to the research reported in this paper is the cultural meaning of learning as conceived by older people from two cultural contexts: Hong Kong and Australia. We want to find out the meaning of learning to elders themselves as they experience it in their cultural and social contexts.

METHOD

As the research was cross-cultural, samples were obtained in Hong Kong and in Queensland, Australia. Data was obtained through a specifically designed questionnaire, the Learning and Ageing Survey (2013) and semi structured interviews in both locations. Ethical clearance was sought and granted by the university human research ethics committees, and written consent was obtained from each participant prior to completing the questionnaire and interview.

Samples

Questionnaire

In Hong Kong, a purposive sampling method was used to recruit 519 individuals, ranging in age from 55 to 75 or above. The Hong Kong sample was drawn from 17 elderly community centres, and care was taken to make sure that they were spread across Hong Kong to cover a

wide range of socio-economic areas. A total of 1,040 questionnaire booklets were sent to 17 centres, and 822 completed copies were returned. Eventually, 519 valid, cleaned copies were used for the study, producing a final response rate of around 50%.

In Australia, sample recruitment took place through two organizations operating in the state of Queensland. The first was a state branch of a national organization, COTA, while the other was a senior citizens organization located south-east of Brisbane, capital city of Queensland. Alphabetical membership lists held by each of the two organizations were used to systematically select the sample. The survey questionnaire was then mailed to each of the selected participants, who independently completed and returned it via reply paid envelopes. From a total of 1,848 surveys distributed to members of these organizations, 421 were returned, yielding a response rate of 22.42%, acceptable for a postal survey.

Interviews

For the study in Hong Kong 18 elders who had participated in organized learning during the past six months and 21 elders who had not were chosen for interview. In Australia utilising a purposive sampling strategy, 28 participants (aged 55 years and older) were identified from 400 respondents. Another 12 interviewees were individually recruited to bring the number to 40. Twenty each of organized and non-organized learners were selected. In selecting participants, consideration was given to age, gender, location, financial status, prior education, and engagement in learning.

In Hong Kong data was obtained by in-depth, face-to-face interviews each lasted about an hour. In Australia participants were invited to take part in a semi-structured interview (lasting approximately 45 minutes) over the telephone or Skype.

Interviews were structured to explore issues of importance to participants. Seven open-ended questions were asked, with the use of prompts, when required, to explore: a) active aging and learning, b) involvement/experience with continuing learning, c) the value of learning, d) reasons for (or not) to engage in learning, e) interests, facilitators and how they wanted to learn and f) barriers and facilitators to learning.

Analysis

Questionnaire

First, descriptive statistics for the meanings of ageing and learning as perceived by elders in Australia and Hong Kong were used. Second, descriptive statistics were provided to identify important learning issues for older learners, including interests, reasons and barriers to their participation in continued learning. Finally, correlation analysis was performed to investigate the relationship between learning and successful ageing, and between learning and the overall well-being and satisfaction of elders in the two study locations.

Interviews

The interviews were audio-recorded and transcribed. The Hong Kong interviews were first translated to English. The data was then subject to manual thematic analysis conducted to identify key categories, themes and patterns (Liamputtong & Ezzy, 2005). Thematic analysis followed three iterative steps: 1) transcripts were read and re-read to identify the overarching themes; 2) manual coding was used to identify common and contrasting concepts and significant experiences, phrases, expressions, or words were identified; and 3) themes were identified, reviewed, categorized and named to understand the perspectives of older learners. This coding process was repeated until the point of data saturation.

FINDINGS

Some major findings from both quantitative and qualitative analyses are described below. They are concerned with views of ageing, learning, structural barriers to learning, and choices of learning activities.

Ageing

On the basis of the statistical analyses Hong Kong respondents' agreement about the attributes of successful ageing were highest for the following three statements:

	Mean (1-6)
Remaining in good health until close to death	5.24
Having a sense of peace about not living forever	5.08
Adjusting to changes that are related to ageing	4.91
For Australian respondents, agreement was highest for the following three statements:	
	Mean (1-6)
Remaining in good health until close to death	5.53
Able to make choices about things that affect how you age	5.52
Able to act according to own inner standards and values	5.47

The results show that elders in both cultures valued good health highly. Hong Kong participants were concerned with peace of mind about not living forever and adjustment to changes, whilst Australians were more concerned with the ability to make choices and to be able to act according to their own values. Neither groups valued longevity highly (Tam, Aird, Boulton-Lewis, & Buys, 2016).

The findings from the interviews show that while the issues of ageing in both places could be described under the same categories, decline, contentment, life journey and new opportunities, the percentages in each category differed in Hong Kong (HK) and Australia (AUS). The biggest difference in distribution in categories for ageing was that 20% of the HK group, as compared to 5% of the AUS group, talked about ageing in terms of decline. The distribution for contentment was similar in both places in that 25% of the HK group viewed ageing as a time of contentment, whilst 20% of Australians expressed the same view. 25% of the HK group saw ageing as a normal part of life's journey, whilst 35% of the AUS group viewed it the same way. Finally, 5% of the HK group viewed ageing as presenting them with new opportunities, whilst 15% of the AUS sample expressed this view (Boulton-Lewis, Tam, Buys & Chui, 2016).

It can be seen from examining both the quantitative and qualitative results for views on ageing that health was the most important issue for the Hong Kong group, whilst the Australian group were most interested in new opportunities and ongoing challenges. Chinese

elders' main concern about maintaining good health, shared amongst older people across the globe, can be further understood with reference to some Chinese folk norms. Chinese people highly value filial piety, expecting their children to pay respect and provide care to older parents. But there is an old saying that "children will become non-filial after prolonged caregiving to a chronically ill parent." Older people, consciously and subconsciously, fear that their children may not be filial towards them if they become unhealthy as they age (Chow, 2006). To this effect, health remains the number one concern for Chinese elders when it comes to ageing.

Learning

Analysis of questionnaire data showed that:

Among Hong Kong respondents, the highest levels of agreement were found for the following three meanings of learning:

	Mean (1-6)
Learning is the broadening of my horizons	5.06
Learning keeps me healthy physically and mentally	5.02
Learning is the acquisition of new knowledge or skills	4.97

Similar results were observed for the Australian respondents with respect to two items, but they differed from their Hong Kong counterparts in being more prone to conceive learning as a lifelong process whilst Hong Kong participants were concerned about health.

	Mean (1-6)
Learning is a lifelong process at any stage of life	5.41
Learning is the acquisition of new knowledge and skills	5.31
Learning is the broadening of my horizons	5.28

The items with the lowest scores that both groups agreed to were the same for both samples.

	Hong Kong	Australia
Learning allows me to continue employment after retirement	3.36	3.03
Learning is obtaining a qualification for re-employment/re-skilling	3.22	3.07

The instrumental meaning of learning for employment or qualifications was conceived by elders from both samples as being less important compared to other meanings of learning at their current stage of life. However some in the Australian sample were learning for some kind of employment (Tam, Aird, Boulton-Lewis, & Buys, 2016).

Views on the meaning of learning from the interviews can be coded using same classification in Hong Kong and Australia; health, purpose, social, interest, and just as part of life. However as with the meaning of ageing the distributions varied between categories in each place. In HK, 25% of the sample said that health matters were their main focus for learning, whilst only 5% of AUS interviewees expressed that view. This is a big difference and aligns with the difference in the views of decline as the main view of ageing expressed by the HK interviewees. In terms of learning as an activity for a purpose 15% of HK interviewees expressed this as their main view and the same was the case for the AUS sample. Ten percent of the HK elders said that they viewed learning as a social activity whilst only 2.5% in the AUS group proposed that view. Learning for interest was the view of 20% of the HK sample and 20% of the AUS sample. Ten percent of the HK interviewees said that learning was just an ongoing part of life, whilst 20% of the Australian sample viewed it this way. This is also a big difference, and it is difficult to explain other than in terms of the major focus of the HK sample on health (Boulton-Lewis, Tam, Buys, & Chui, 2016). The higher percentage (10%) of HK elders who conceived learning as a social activity seems to support the claim that Chinese are more 'collectivistic'. They value the social dimension of learning, as argued by social psychologists that collectivist cultures are more inter-dependent and group-oriented, as opposed to Western culture which is more individualistic (Markus & Kitayama, 1991). The idea of learning as a social activity amongst Hong Kong Chinese may be attributed to the collectivist cultural orientation found in most Eastern cultures (Kim, 2004).

Barriers to learning

The focus in this section is on barriers to learning. The questionnaire data in Hong Kong and Australia showed that personal and health reasons were important as barriers. The analysis of the questionnaire data (Tam, Aird, Boulton-Lewis, & Buys, 2016) shows that:

Samples of elders in Hong Kong and Australia rated the same two barriers most highly:

	Hong Kong	Australia
Personal health reasons	4.36	3.77
Money (programmes are too expensive)	4.01	3.55
The barriers that were least likely to be a problem were also similar for the two groups.		
Did not feel welcome on campus	2.76	1.91
Bad experience at school before	2.96	1.93

With reference to the typology of barriers by Cross (1981) and Darkenwald & Merriam (1982) who classified learning barriers into dispositional, situational, and institutional ones, it seems that older learners in both locations were more affected by dispositional and situational barriers, while experiencing least concern with barriers related to bad experiences within educational institutions.

The analysis of interviews in Australia focused on structural (situational) barriers because dispositional barriers have been well described in the literature. It was found that the main structural barriers to learning for older people in Australia were cost, time, travelling and transportation, and issues such as availability of courses. Basic costs, as described in interviews, included those of taking the courses, of the Internet, and the prohibitive costs of further formal study. The barriers identified in Australia are consistent with those described above from the questionnaire data including time and money (Sloane-Seale & Kops, 2004). Lack of programme information, insufficient programme selection, lack of motivation, and lack of confidence in ability were also identified. These barriers align with the categories suggested by Cross (1981), specifically, dispositional, situational, and institutional barriers. The situational and institutional barriers constitute those structural barriers. Findsen & Formosa (2011) also proposed informational barriers, and Daniel et al. (1977) included location of activities and transportation (Boulton-Lewis, Aird, & Buys, 2016).

Hong Kong participants also mention all three types of barriers: dispositional, situational and institutional. Dispositional barriers include “I am not too focused, very easy to forget things”, “I think I am too stupid to catch up with others”. As for situational barriers, the most often cited are lack of time and poor health. Examples of institutional barriers include the mismatch of course schedule and interests, fees, distance, poor administration, lack of information and even, boring teachers. Hong Kong interviewees seem to express more concerns with institutional barriers than their Australian counterparts. When given the chance, elders were

more willing and vocal to talk about institutional barriers they found to inhibit their participation in learning (Tam, 2016).

Learning interests and choices

With respect to learning interests, respondents were given a choice of 12 subject areas. The top 3 chosen areas of interest were the same for both samples: Health, Leisure and Art. The least preferred areas for the Hong Kong group were: Humanities (e.g. politics, history, sociology), Sciences (e.g. biological, astronomy, geology, environment related), and Finance (e.g. financial planning, investing). The Australian group was least interested in Basic Education (e.g. primary/secondary), and Literacy and Grammar (e.g. native and foreign languages). The results indicate that older people in both locations want to learn about matters relevant and meaningful to their health, related to leisure and personal development. Differences regarding subject areas of lesser interest are perhaps due to the fact that the Australian sample was generally more educated than the Hong Kong sample, so that they did not need to learn about grammar and literacy, nor gain a basic education (Tam, Aird, Boulton-Lewis, & Buys, 2016).

The interview data in Australia was further examined for learning choices.

Interviewees described active ageing encompassing learning that was either for pleasure and leisure or for purpose and relevance.

In the pleasure and leisure strand, participants said they wanted to learn for stimulation and interest or for social reasons. They wanted to enhance their lives by engaging in creative activities, such as languages or arts and acquiring new knowledge. Social activities were varied but were engaged in to meet regularly with others.

In terms of purpose and relevance, some participants were very concerned about keeping physically and cognitively fit, and mitigating the effects of ageing. Technology skills were important in themselves and in facilitating other activities.

Generally most participants in Australia wanted to enhance their lives, learn new things or things that they 'loved' or enjoyed, to retain independence and engage in activities to keep their minds and bodies active (Boulton-Lewis & Buys (2015).

Similarly, Hong Kong interviewees also expressed that they wanted to learn things interesting and relevant to them. Examples include “Learning is interesting. For me, pursuing knowledge is fun ... I choose to learn whatever interests me ...”; “There is a lot I would like to learn, e.g. Chinese calligraphy.” Also, they said they wanted to learn more about health; “Actually I like to learn more about health”; “I think health is the most precious thing for human beings ... I learn about Chinese medicine for my own sake.” Learning to use computers for practical use was mentioned by some interviewees: “I love learning to use computers. But the thing is you should use it after you learn it, or else you will forget it”; “I want to learn about computers” (Tam, 2016). According to government statistics, Hong Kong has a well-developed ICT infrastructure (International Communication Union, 2015) and high household broadband and mobile penetration rates (Hong Kong Government, 2016). Elder persons are, however, generally less savvy with technology compared to younger generations. As such, Hong Kong elders want to stay up to date by learning to use computers (Kwong, 2015).

Relationship between learning and ageing and well-being

Table 1. Correlations between learning and successful ageing and well-being

		Hong Kong Sample	Australian Sample
		I am ageing successfully or ageing well	I am ageing successfully or ageing well
I am ageing successfully or ageing well	Pearson Correlation Sig. (2-tailed) N	1 515	1 415
Overall, how satisfied are you with your life nowadays?	Pearson Correlation Sig. (2-tailed) N	.513** .000 514	.607** .000 415
Overall, how happy do you feel most of the time?	Pearson Correlation Sig. (2-tailed) N	.418** .000 513	.530** .000 415
For your age, in general how would you rate your health?	Pearson Correlation Sig. (2-tailed) N	.285** .000 511	.477** .000 415
In your opinion, how important is participation in continued learning to successful ageing?	Pearson Correlation Sig. (2-tailed) N	.314** .000 514	.245** .000 415

Remarks: ** Correlation is significant at the 0.01 level (2-tailed).

Results from correlation analyses show that for both samples, respondents' self-rating of successful ageing was significantly related to participation in learning, life satisfaction, happiness, and their general health condition (Tam, Aird, Boulton-Lewis, & Buys, 2016). The implication is that later life learning interacts positively with the overall well-being of elders, enabling them to age successfully.

DISCUSSION

In summary we find interesting similarities and differences in terms of ageing and learning in Hong Kong and Australia.

Views of ageing show that elders in both cultures greatly value the maintenance of health. Hong Kong participants were concerned with peace of mind and adjustment, whilst Australians were more concerned with the ability to make choices and to be able to act according to their own values. The biggest difference in distribution in categories for ageing was that 20% of the HK group, as compared to just 5% of the Australian group, talked about ageing in terms of decline. Only 5% of the HK group viewed ageing as presenting them with new opportunities whilst 15% of the AUS sample expressed this view.

The questionnaire analysis shows that both groups agree that learning broadened horizons and led to acquisition of knowledge and skills, but Australians also saw learning as a lifelong process, whilst Hong Kong participants were concerned mainly with health.

The interviews could be organized under the same categories. The results were similar for the categories of learning for a purpose or interest. The differences are that more Hong Kong participants saw learning as a social activity, whilst more Australians saw learning as an ongoing part of life.

Older learners in both cultures were more affected by dispositional and situational barriers, specifically health and money, while experiencing least concern with barriers related to bad experiences within educational institutions. In Australia analysis of the interviews showed that the main structural barriers to learning were cost, time, travelling and transportation, and issues such as availability of courses. In Hong Kong elders mentioned all three kinds of barriers, with the interviewees expressing greater concerns over the institutional barriers than

their survey counterparts when they were given the chance to talk and elaborate during the interviews.

Learning choices in both places were similar for health, leisure and art activities. The differences were that the Hong Kong group were less interested in humanities, science and finance whilst the Australian group were less interested in basic education and literacy and grammar.

Analysis of the interviews in Australia indicates that participants wanted to engage in creative activities such as languages or arts and acquiring new knowledge. Social activities were varied but were engaged in to meet regularly with others. Some participants were very concerned about keeping physically and cognitively fit and mitigating the effects of ageing. Technology skills were important in themselves and in facilitating other activities.

With respect to learning interests, Hong Kong interviewees also showed a similar view that they learned mainly for interest and that learning itself is fun. However, they seemed to be more practical as a significant number mentioned learning health and computers for practical reasons.

The cross-cultural research involving elders in two cultures: Hong Kong and Australia has so far reported both differences and similarities regarding the conceptualizations of the meaning of ageing and learning, reasons and barriers for participation and non-participation, interests and choices for learning. The fact that there are both commonalities and differences between the two samples of elders from two different cultures suggests a possibility that cultures can overlap and coincide. This runs contrary to the East-West dichotomous view of learning and ageing for people from diverse cultures. Culture is not static; at times, it can be flexible and susceptible to change (Lewis, 2011). As Jarvis (2009) puts it, we are not two different cultures that will never meet nor overlap; rather, we are simply parts of different cultural groups to which we belong.

CONCLUSION

The current research reported in this paper is a cross-cultural study of ageing and learning with elders in two cultures: Hong Kong and Australia. The two methods of study, quantitative and qualitative, are complementary, and provide opportunities for elders to explain what they mean by ageing and learning, by survey and interview. The combined methodology has produced revealing findings for two highly subjective and elusive concepts like ageing and learning. The results shed light on the motivations, interests and barriers to learning participation in later life. Such insights can be instrumental to help governments, policy makers and education providers craft policies and plans to broaden and deepen the participation of elders in learning as they age. Learning has the potential to positively influence elders' quality of life. More learning opportunities and larger varieties of provision are needed if we want to enhance the elders' overall chance of ageing successfully.

The cross-cultural aspect of the current research is important as there has been limited research on cultural influences on elder learning and very little that sheds light on learning from the elders' perspective. By way of a survey and interviews, the current study elucidates the meanings of ageing and learning, and provides information about needs, interests and barriers to participation. Elders from the two cultures were allowed to explain what they mean by ageing and learning and what they see as important. The fact that there are both similarities and differences between cultures hints at the possibility for cultures to overlap and coincide. Such is a broader view of culture as opposed to the simplistic East-West comparisons commonly found in cross-cultural research.

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